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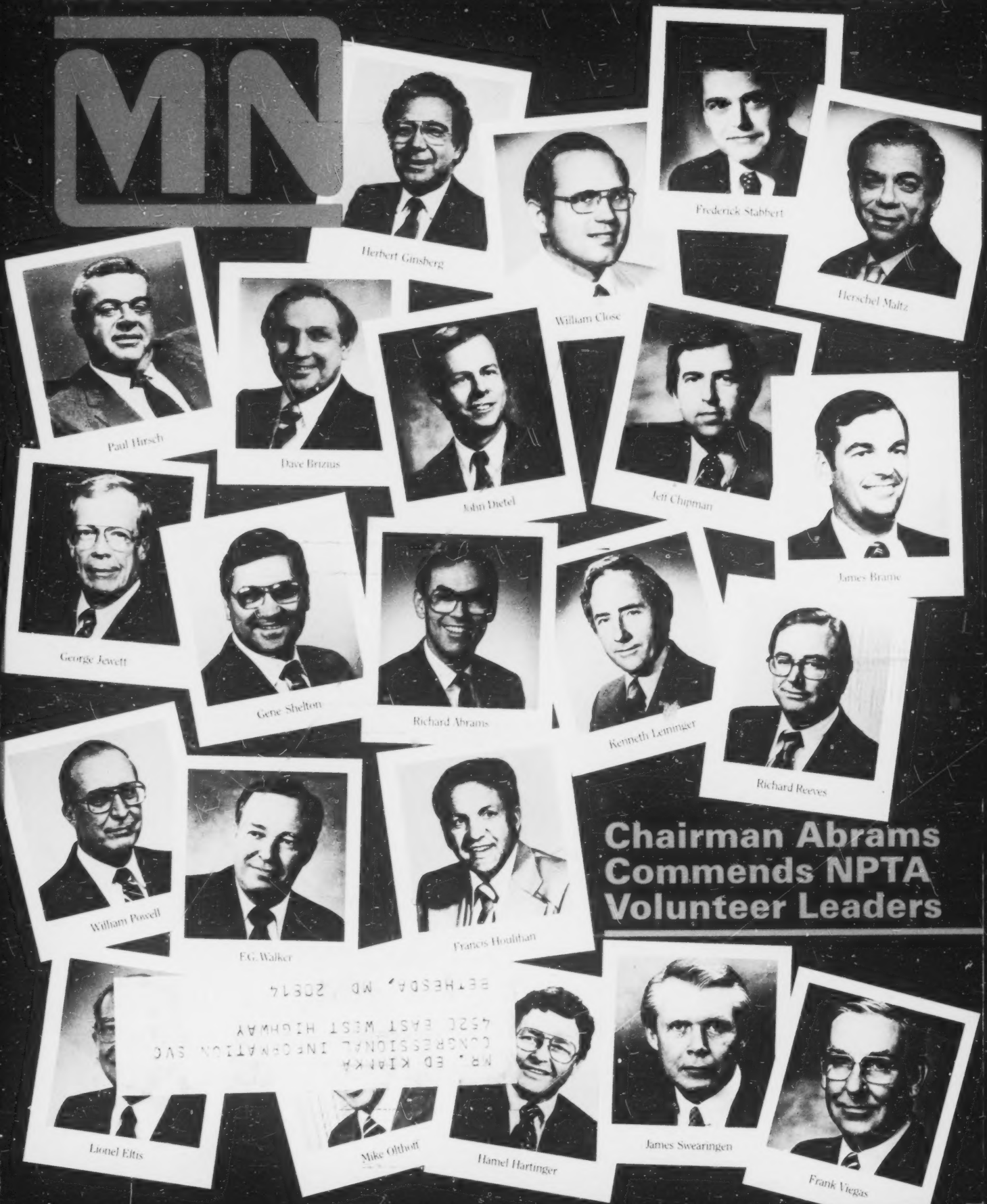
NPTA MANAGEMENT NEWS

NOVEMBER 1985

MN



Chairman Abrams Commends NPTA Volunteer Leaders

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National Paper Trade Association, inc.
Editor
William H. Frohlich
Contributing Editors
John J. Buckley, Jr.
John S. LaRosa
Richard J. Lerman
Bruce H. Linden
Editorial Assistants
Linda Guttman
Carole Morgenthal
F. Berneice Underwood
Advertising Director
Richard J. Lerman
Production Manager
Joann Simberlund
Art Director
Dagfinn Olsen

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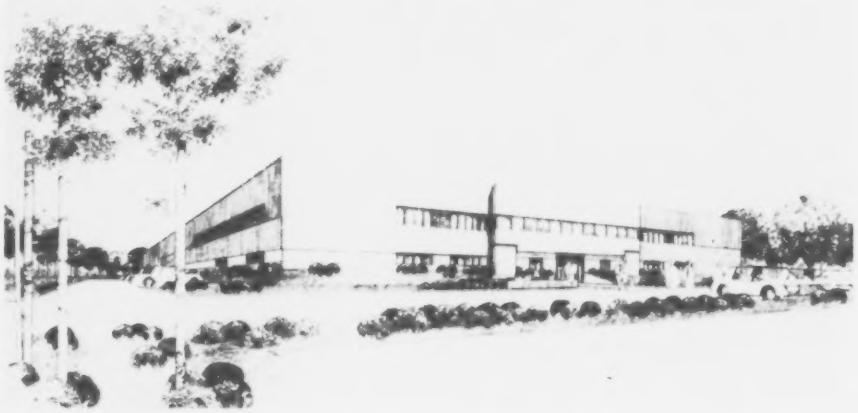


LINDENMEYR OPENS NEW FACILITY

Lindenmeyr Paper Corporation has moved its New England regional operations center to a major new facility in Canton, MA, which will also serve as sales and warehouse center for the Greater Boston area, according to an announcement by Alfred M. Schlosser, president of the 126-year-old paper merchant firm.

The structure, built specifically to Lindenmeyr specifications, represents a quadrupling of the warehouse space, and a fivefold expansion of the office space available at Lindenmeyr's former Boston location. It is located in a newly-developed industrial park positioned strategically to provide quick access to Metropolitan Boston and environs as well as to the entire northeast New England territory. Mr. Schlosser declared, "the new site will enable us to provide better and more rapid service throughout the area, and, perhaps surprisingly, permits us to make faster deliveries in downtown Boston than we could accomplish previously from our in-city location."

The new facility, Mr. Schlosser added, is fitted with the most advanced equipment available, including newly-developed storage and materials handling systems, landscaped office interiors with ambient lighting, sound-masking equipment and a state-of-the-art communications system.

In addition to extensive warehouse space with 25-foot ceilings and office areas from which the entire New England sales territory will be supervised, the facility will also house a Graphic Resource Center, providing paper-selection advice and services to the graphic arts community of Greater Boston.

KILLHOUR COMMERCIAL BUYS G.A. RINN

"I am pleased to announce that G.A. Rinn Paper in Allentown, PA, has become part of our company," said James W. Barrett, president of Killhour Commercial Paper Company headquartered in Philadelphia, PA.

G.A. Rinn was owned and managed by Bob Kline and Cliff Pate. The two men will continue to play an integral part in the future of Killhour Commercial, the company reported.

"This latest acquisition is another step taken to assure us of future growth and also enable us to better service our customers' needs," Barrett said.

NEW PAPER CONSULTING COMPANY FORMED

Walker Wiener Associates Inc. (WWA) will open its U.S. office at 190 North State Road, Briarcliff Manor, NY 10510 (914–762–8808). The new company will be managed by Norman Wiener, who has over 17 years experience in paper, printing and packaging related industries.

WWA will specialize its activities in areas relating to the needs of paper and paperboard producers, as well as major users and marketers of these grades (i.e., printers, specialty and packaging converters, publishers, distributors, retail merchandisers, etc.).

Some of the planned activities of WWA will include: marketing research, new market and product studies, sales development/planning, image/attitude studies, acquisition identification, company profiles, publicity-related research programs and market-related training speeches/programs.

Norman Wiener, VP and general manager of WWA, has been involved with marketing activities related to paper, paperboard, packaging and converted products during his career. He has held positions with Great Northern Paper, St. Regis Corp. and Strategic Futures, Inc. (SFI). In his most recent position with SFI, Mr. Wiener was responsible for the development of the company's highly received PAPOR study (Paper And Printing Outlook Report).

Walker Wiener Associates will be affiliated with Jaakko Poyry Oy of Helsinki, Finland (one of the world's leading forest products engineering and consulting firms) and Walker Watson Associates of Guildford, England, an international market research and consulting company specializing in pulp, paper, packaging, non-woven, printing and related industries serving clients worldwide. In the U.S., Jaakko-Poyry is represented by Poyry-BEK in Raleigh, NC, a specialized consulting firm that studies mill improvement.

PAPER COMPANY FOR SALE

In an effort to keep *MN* readers well informed, the magazine will publish opportunities like this one:

For Sale: Dual paper distributor in Central PA. Well established and profitable. Approximately $2 million in annual sales. Inquire in writing to MN.

ERVING CELEBRATES 80 YEARS OF SERVICE

1905.

Teddy Roosevelt was president. The Russo-Japanese War raged in the Pacific. The automobiles of the day (what few there were) were called "horseless carriages."

A ticket to the World Series between the New York Giants and the Philadelphia Athletics cost a dollar. And Erving Paper Mills produced its first paper napkin.

80 years later, that same paper company is a recognized leader in the manufacture of napkins, paper towels, bathroom tissue and other specialty papers, with a future that's brighter than the colors on its handsome new designer products, the company said.

PRESIDENT OF NEENAH PAPER DIES TRAGICALLY

The paper industry is grieving the loss of John O. Skagen, president of Neenah Paper, who was killed in the DC–9 plane crash in the Milwaukee area on September 6, 1985.

For almost 38 of his 58 years, John had served with Kimberly-Clark in various sales and management capacities, most recently as president of Neenah Paper.

Hired at Neenah, WI in 1947, John had advanced rapidly in marketing responsibilities. After a training period in Wisconsin, he was assigned to the West Coast and for a period served as regional sales manager for a paper merchant subsidiary of Kimberly-Clark. For several years, he was in sales management in New York City before being transferred to Neenah, WI with Neenah Paper. Three years ago, he was assigned to Roswell, Georgia when the headquarters of Neenah Paper was moved to that location.

He is survived by his wife, Velda of Roswell, GA, two daughters, Karen of Atlanta and Judy of Milwaukee, WI and one brother, Ernest Skagen of Stockton, CA.

UNISOURCE CONSOLIDATES WESTERN FACILITIES

Consolidation of the physical facilities of The Unisource Corporation, following the merger of two major Western paper distribution firms, has been announced by Raymond A. Peterson, president, at the company's corporate offices in Long Beach, CA.

Central regional offices and San Francisco divisional offices, warehouses and delivery facilities of former Carpenter/Offutt in South San Francisco and of former Blake, Moffitt & Towne, Bribane, CA, were moved in August, 1985 to a spacious, modern paper distribution center in Dublin, CA, according to Peterson.

Other completed physical moves, Peterson indicated, include the transfer of former Carpenter/Offutt northern regional and divisional offices, warehouse and delivery facilities in Seattle to the former BMT paper distribution center in Kent, WA; also the consolidation of all of Unisource's Portland, OR, division operations at the former BMT paper distribution center in Milwaukee, OR, and of its Fresno division operations at the former BMT South Cedar Avenue facility; and the Sacramento division's relocation to the former Carpenter/Offutt plant on Cebrain Street.

Also in process, is the consolidation of all Los Angeles fine paper and industrial products warehouse operations of The Unisource Corporation in the company's City of Commerce facility. There is also a similar consolidation underway for Unisource facilities in Phoenix, AZ, Peterson said, as well as the relocation of its Fairbanks, AK plant to modern quarters.

SHORR PAPER EXPANDS WAREHOUSE

Defying the odds and pressures of a depressed agricultural market, Shorr Paper Products has expanded its Iowa branch and opened its own 20,000 square foot warehouse and office in Marshalltown, IA.

From its beginning as a one man operation run from the home of branch manager Gary Myers, the Iowa branch will do over $3 million in sales this year.

Quality products and a hard working sales force, led by Myers, have built an enviable reputation for Shorr Paper from Omaha to the Mississippi River, the company said.

Headquartered in Aurora, IL, the 63 year old company also operates a Chicago sales office. The company sells industrial paper and packaging and is one of the Midwest's largest converters of industrial kraft and newsprint.

FONDA ACQUIRES CONTINENTAL CONSUMER PRODUCTS

The Fonda Group, Inc. has acquired the business and assets of Continental Consumer Products, Inc., manufacturers of the bondware line of paper disposables sold through supermarkets, according to

Albert C. Lasher, Fonda's chairman and CEO.

Continental Consumer Products was acquired from Federal Paperboard Company, Inc. of Montvale, NJ. In addition to the bondware consumer line trademarks and designs, Fonda has acquired Continental's manufacturing plants in Atlanta, GA, and Three Rivers, MI, as well as its raw materials and finished goods inventories. Terms of the acquisition were not disclosed.

Continental principally manufactures disposable paper plates and markets plates and cups for consumer use, mainly through major supermarket and variety store chains.

"The plants acquired in Georgia and Michigan-with our existing manufacturing plants in St. Albans, VT; Williamsburg, PA; and Santa Clara, CA-make it possible for Fonda to provide the most responsive national service to our customers," Lasher said.

This is the second acquisition by Fonda in a matter of months. Earlier this summer, Fonda acquired certain assets of Superior Paperware Company of Marion, IN, including Superior's name, trademarks and designs. Superior previously manufactured disposable paper plates and cups for consumer use, marketing through supermarket and variety store chains.

The Fonda Group, Inc., is a nationwide manufacturer and supplier of disposable paper products for both consumer and institutional foodservice use.

PEOPLE IN THE NEWS

Clyde M. Speicher, Jr. has been appointed manager of market development for the Jacksonville, FL branch of Virginia Paper Company.

James Holtsclaw, has been elected president of Carpenter Paper Company, Grand Rapids, MI. **Frank Geary** has been named vice president and treasurer and **John Idema III** has been appointed manager-internal operations.

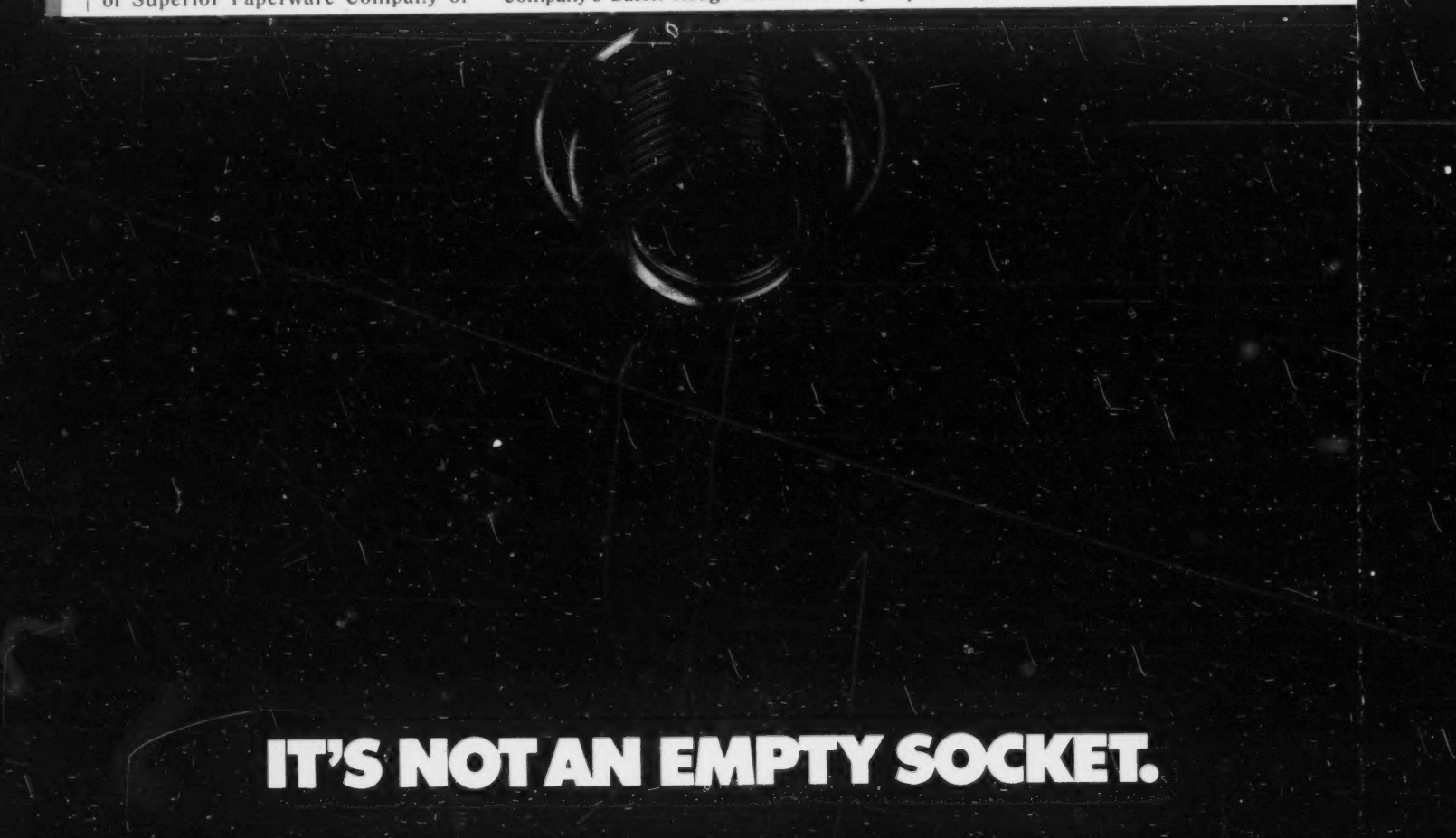
John Stangby has been promoted to assistant general manager of Butler Paper Company's Baton Rouge division. **Jerry Lippert** has replaced John as manager of their Fargo branch and **Tom Harper** has been named manager of the Sioux Falls, SD branch of the company.

Mike Maltz has been promoted by Century Papers to division manager of their Houston operation. **John Wayne** has become marketing manager in El Paso and **Steve Clark** has been named sales manager in Houston. Also named were **Jerry Maltz** as marketing manager in Austin, **Gary Strouse** has been named sales manager for the company's Houston Division and **James Lange** has been appointed as a sales manager there.

Thomas F. Cooke has been promoted to senior vice president-operations of The Lindenmeyr Paper Corporation. **John J. Curry** has been named assistant vice president in charge of real property and **Joan D. Boltax** has become assistant vice president of human resources.

Terry Domres has been named executive vice president of Niagara of Wisconsin (subsidiary of Pentair) and **Verle Sutton** has become vice president, sales.

William Frasher has been named vice president, sales and trade relations for



Marcal Paper Mills.

Robert Mastrianni has become assistant to the president of Erving Paper Mills, David G. Oxley has been named vice president-corporate marketing and William P. Ellis has become vice president-sales.

BUTLER PAPER REPORTS YEAR'S PROGRESS

Butler Paper Company experienced rapid growth in 1985, as indicated by the opening of three new warehouses and the integration of Chatfield Paper's three locations in Connecticut, Rhode Island, and Massachusetts, with the Butler network. The company's growth was recognized by its parent company, Great Northern Nekoosa Corporation, when it named Butler president F.G. Walker vice president of GNN in February and elevated Butler to full division status in July.

New warehouses replaced older facilities in Milwaukee, WI, Tulsa, OK and Colorado Springs, CO. In each case, the new facilities were designed to incorporate the most modern materials handling systems, and to accommodate future growth, the company said.

The Chatfield Paper organization became part of Butler Paper in December, 1984, marking Butler's first entry into the New England market. Chatfield Paper's president, Alan Lang, became the vice president-eastern operations for Butler, assuming responsibility for the company's divisions in Maryland, Indiana and Michigan in addition to the Chatfield locations.

PAPER DISTRIBUTION INDUSTRY
BEST SELLERS

Rank	Publication	Last Month
1	Practical Handbook of Distribution/Customer Service. *Blanding.* $40	10
2	Branching and Market Coverage. *Healy.* $35	1
3	Measuring Customer and Product Line Profitability. *Mullins.* $35	8
4	Increasing Profits Through Better Marketing. *Healy.* $35	2
5	Paper Merchant's Guide To Personnel Selection and Evaluation. *Cotter.* $85	5
6	What Really Helps (or Hurts) Your Company's Bottom Line. *Tape and Guide.* $50.	3
7	Strategic Planning: A Fitness Program For Distributors. *Norris, Garrett, Samek.* $35	6
8	Introduction to Wholesale Distribution. *Danenburg/Moncrief/Taylor.* $35	4
9	Automated Inventory Management. *Graham.* $35	—
10	Industrial Paper Merchant Sales Compensation. *NPTA.* $40	—

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IT'S A NEW BUSINESS OPPORTUNITY.

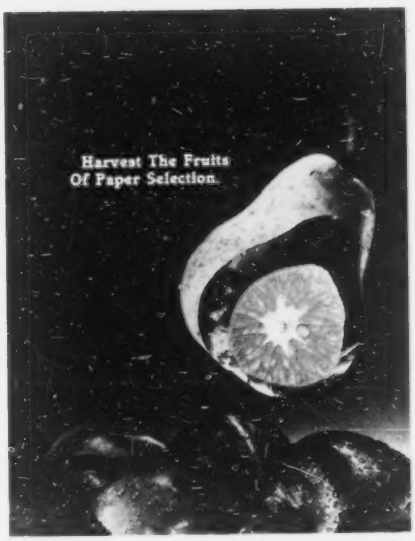
PRINTING PAPER

SHOW THEM THE FRUITS OF PAPER SELECTION

A new marketing tool, "Harvest the Fruits of Paper Selection," has been launched by the National Paper Trade Association as a campaign to promote the use of high quality paper in the graphic arts industry. It focuses on the informational needs of printers, graphic designers and other specifiers who must consider paper selection for certain types of print jobs.

"The new piece is an outstanding guide for everyone in the printing or graphic arts industry," said Frederick J. Stabbert, president of Zellerbach Paper Company and chairman of NPTA's Printing Paper Division. "It clearly indicates that 'trading up' to a better quality paper adds only a small percentage to the overall cost of a job. But the difference in the finished product may make the results sing with success," he said.

"Harvest the Fruits of Paper Selection" uses an apple, a peach and a banana to illustrate the costs of particular print jobs. Each fruit is sliced in different size sections to illustrate the relative dollar costs for each component of specific printing projects. The sliced fruit graphically demonstrates that when art and composition, research and copy, pre-press preparation, printing and binding, mailing and postage are considered along with



paper cost, trading up, in one example, from a 60lb. ordinary coated paper to an 80lb. high-line coated stock adds only 2.4% to the job. There is information for both coated and uncoated papers.

The facts that are used to document costs of each job were supplied to NPTA by the National Association of Printers and Lithographers (NAPL). The data is current and realistic.

"This very special marketing tool is the hottest thing to come along for our industry in quite some time," said William H. Frohlich who is NPTA's vice president of communications and secretary of their Printing Paper Division. "The creative community has already fallen in love with the 'Harvest' concept and they have found the information to be right on the money."

"Harvest the Fruits of Paper Selection" is an 8 1/2 × 11, four page folder printed on an unnamed, very high quality coated 80lb. cover weight stock. It is printed in four color and the treatment of the fruit, being actual photographs, makes them appear three-dimensional, giving the impression that they are leaping off the paper. (Obviously, if this piece was printed on a low quality paper, the fruit wouldn't leap!)

The back page of 'Harvest' has ample room for custom imprinting, and they are available from the NPTA Communications Department at 111 Great Neck Road, Great Neck, NY 11021.

Quantity	Cost For Each	Imprinting
1–100 101–500 501–1,000	50¢ 48¢ 46¢	Custom imprinting is $65 per order
1,000–5,000	44¢	Custom imprinting is $100
5,000–10,000 over 10,000	42¢ 40¢	Free custom imprinting

TOP 10 QUICK PRINTERS IN NORTH AMERICA

Here is a list of lists of the 10 largest quick printing companies in the United States and Canada (taken from *Quick Printing* magazines survey of the top 100 companies.

Company	1984 Sales (in millions)
1. The Printing House Ltd. (Toronto, Canada)	$11.44
2. Balmar Inc. Copy Center, Div. of Balmar Printing & Graphics (Arlington, VA)	9.86
3. Spaulding Co., Inc. (Stoughton, MA)	8.25
4. Pandick Technologies, Inc. (New York, NY)	8.00
5. Gumpy Copy Centers (Kensington, MD)	7.50
6. Moore Business Center, Div. of Moore Business Forms (Glenview, IL)	6.83
7. Curtis 1000 (Smyrna, GA)	6.00
8. Express Press (Highstown, NJ)	5.50
9. Print Right, Div. of Graphic Information Systems (Wilsonville, OR)	5.20
10. CopyQuick, Inc. (Everett, MA)	5.08

IMPORT FIGURES FOR PRINTING CONTINUE TO RISE

The Commerce Department has released figures for imports and exports of printed

(Continued on page 20)

Jack Carew
President

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Richard W. Abrams Elected NPTA Chairman At the Annual Convention

The election of Richard W. Abrams to the position of Chairman of the Board of the National Paper Trade Association took place at the Association's Annual Business Meeting, held in New York City on October 6, 1985.

His friends and the people at West Coast Paper call him "RW." Richard W. Abrams succeeded his father, Dick Abrams. The company RW's dad founded in 1930 has become an integral part of the Seattle business community.

During RW's tenure as chief executive officer of the company, West Coast has grown from that original location to 12 branches and affiliated companies in the states of Washington, Oregon and Alaska.

Against the backdrop of Mt. Rainier and the Puget Sound, RW spoke with *MN* editor William H. Frohlich about his company, his Association and his industry.

MN: How did you get started in the paper business?

ABRAMS: I was born into the paper business. I worked part-time in the company while growing up. But following college, I decided to go into the research end of the paper business. It was not until after I completed my graduate work that I decided to join the family business.

MN: How long has the business been in your family?

ABRAMS: Since 1930 when my dad started it. The depression was a tough time to do that, but he did and was successful.

MN: In the 55 years of its existence, how has West Coast Paper grown?

ABRAMS: The focus of our growth has always been and will continue to be customer service; a good product at a fair price— that's how my dad started. The first three years of business was industrial papers only then he was able to add printing paper lines. For many years, industrial paper dominated. By the 1950s, it was an even split and today here at West Coast Paper, printing paper makes up about 65% of our business.

I came back into the business in 1963. At that time, we were still a single location. Subsequent to that we branched out adding five locations here in the state of Washington plus Supplyways in Oregon and other affiliated operations in the Pacific Northwest.

MN: What will the future be like for West Coast Paper?

ABRAMS: Our marketing plan calls for us to be a full service distributor serving the states of Washington, Oregon and Alaska.

MN: To make that happen really requires the help of many people. How important are your people to your operation?

ABRAMS: The people ARE our operation. The dollars happen to be tied up in inventory and accounts receivable, but the real guts of our business are our people.

We have a very low turnover rate for personnel in general. There are many qualified people on the outside that would like to come with West Coast Paper, I'm proud to say. And it's interesting to look at those who have experienced the West Coast Paper environment. I can think of many examples. The gentleman that was our warehouse manager for years just wanted a steady job. He retired some 30 years later. We have been blessed with very strong loyalty.

MN: What have you done to create that loyalty? Employers don't usually gain respect and loyalty automatically. These things have to be earned just as an employee must earn the respect of his boss.

ABRAMS: I think it's fair to say that any company has its challenges, its ups and downs. This puts people through excitement and frustration. But through thick and thin, our focus has been to keep the individual employee well–being in mind. We have sponsored programs that have helped people grow.

MN: What changes do you see taking place in the paper industry that affect your business?

ABRAMS: We're seeing some interesting things going on. There is a consolidation of productive capacity through mergers and buyouts

happening now. I think this trend will continue on the production side of our industry.

On the merchant side, consolidations through mergers will probably continue. Foreign money is coming into the United States and buying up distribution on the East coast and some in the Midwest. They are actively looking here on the West coast.

Although this trend toward larger companies with more locations is in evidence, running counter to that is the fact that the U.S. saw more new business starts last year than any other year in its history. As the bigger companies grow bigger, there is an ever-increasing opportunity for smaller aggressive companies to be outstanding performers in the paper business.

MN: Do you see any threats to the paper distribution industry ahead?

ABRAMS: Certainly a threat, from my point of view, is the possibility that our industry leaders will fail to address the new technology and innovations that can make paper distribution more efficient. This can leave the door open for other modes of distribution that bring product to market. As examples, food service papers can move to the wholesale grocers or copier papers can go through an OEM. There are competitive pressures from a whole spectrum of businesses. Unless we as an industry continue to move toward more efficient means of distribution, there is a definite possibility of losing markets.

MN: Are there any significant opportunities for paper distributors on the horizon?

ABRAMS: The opportunities are unlimited. As I talk with paper merchants around the country, I'm continually amazed at some of the things individual merchants are doing. What is right for one merchant, though, is not necessarily right for another. The critical thing is to know what you are good at, where your position in the market is then to capitalize on what you do best.

Most paper merchants are very good at merchandising and distribution. They can pinpoint the segment of the paper industry that they are good at and then its very easy to add specific non-paper lines that are a natural adjunct to the segment of the industry where they are already strong. That's a good way to supplement business. But, if you can't identify the segment you belong in and what you're good at, you might be trying to do too much for too many people.

MN: That assumes that you can do some good market research. How do you keep your ear to the ground to know what's happening in your market area?

ABRAMS: We try to stay in very close communication with our sales people so that we constantly get customer feedback. On the other side of it, we always have an open ear to the manufacturers. This way we can stay in tune with what's available.

We've had instances where we've bridged between the two and have actually been a party to the development of new products to meet specific needs.

MN: That is certainly on the opportunity side. Do you have a sense of the future of the paper distribution industry?

ABRAMS: There are many things happening that are sign posts to the future. There are some significant producers in this country that have openly said that they are better off moving more product through distributors rather than selling direct. The value of the distributor is growing.

Within paper distribution itself, I see very

R. W. in his office at the headquarters of West Coast Paper Company.

efficient material handling and distribution of commodity lines whether they be industrial or printing in the future. At the other end of the scale, I see very successful companies that are willing to innovate to satisfy emerging customer needs. For example, this can be in specialty packaging or in high levels of graphic design. Many of our members have been doing this type of specialization for years.

MN: You personally have been involved with NPTA as a volunteer leader for six years on the Association's Board of Directors. What changes have you seen in that time that have benefited members?

ABRAMS: The structure of NPTA, itself, is different now. It has changed dramatically with a very heavy emphasis on education and a strong accent on service to the member firm.

Today, NPTA utilizes a plan at accomplishment on all levels. The Board relies on the direction provided by the working committees. This means that each committee has more responsibility and that working on a committee has become more meaningful.

MN: I sense you have great respect for the members of the board and working committees.

ABRAMS: Respect yes. But more than that. I admire them for their efforts. It is an honor to be able to work with the outstanding people of our industry that give up their time and talents to serve as our volunteer leaders.

MN: What are the NPTA member benefits to a company like yours?

ABRAMS: There are direct and indirect benefits. The long list of Association services, I feel, speak for themselves. I find some of the intangibles even more important at times. As a member of the paper distribution industry, the value of being part of an industry association is extremely important. We can consolidate our efforts. Whether you look at that from an educational standpoint, conveying ideas or as an interface with the suppliers to our business, the value is there. We work cooperatively to develop programs on an industry-wide basis. There is tremendous value to being part of a national organization, like NPTA.

MN: So there are benefits to both the company and industry.

ABRAMS: There ARE benefits to the industry. Whether an individual company recognizes it or not, these benefits are continually flowing back to the participating company. The more support that individual company can give to the national effort, the greater the feedback to each company in NPTA.

The momentum is circular. That's what I find so exciting about the Endowed Chair program recently launched by the PAPER Foundation. It would be impossible, to say the least, to create a research project of that magnitude by one company. As an industry effort, the payoff is down the road, but the university-level study that will take place will generate benefits that will be enjoyed by all paper distributors whether they participated or not. The forward-thinking companies are choosing to participate.

MN: In the time you have been on the Executive Committee of the Association's Board of Directors, NPTA has seen quite a number of other important developments. Why has there been so much new activity in such a short time?

ABRAMS: For one thing, the quality of the NPTA staff today is head and shoulders above what it was 10 years ago. The reason this has come about is that the Association has a well-defined focus. What NPTA is, why it exists, and where we as an Association are headed has been made clear, and this has given us both a better staff and a more sophisticated committee structure with good people willing to serve. All the people involved with NPTA are more satisfied because they can see a clear direction to their work.

MN: Is it fair to say that the committee structure drives the Association?

R. W. Abrams, left, stands in his Converting Department with Jim Crum, center, and Jim Schley.

ABRAMS: Yes it is. The way NPTA operates today is with an array of committees that are responsible to the Board of Directors for performance and accountability in their areas of expertise. What we have seen is a continuous dialogue between the Board and the committees and an increased willingness on the part of the Board to rely on the recommendations of the committees. The projects that are generated are defined by the committees and not the Board.

MN: How do you view your role as NPTA Chairman?

ABRAMS: Being the elected leader of the industry, is a humbling experience. I feel that it is important to set a tone of leadership and accountability for both the volunteer leadership and the staff.

There is a great tradition at NPTA to have among its ranks good volunteers. This is what has allowed us to prosper as an organization. As Chairman I intend to encourage both our volunteer leaders and our staff to put forth their best efforts for their own satisfaction and the benefit of our members and industry.

MN: So what will the future be like for NPTA?

ABRAMS: With the high quality of both staff and volunteers, the need is not so much to define new programs as it is to help focus on those programs most worth pursuing.

In this coming year as the leader of NPTA, my primary goal will be to have NPTA, as an Association, bringing about specific performances on projects that are in process and at the same time taking a look ahead three to five years at what the future will be. We must position ourselves today to perform in the future, especially in terms of personnel and finances.

MN: We spoke of threats and opportunities before. Do you see specific opportunities or threats to NPTA in the next three to five years?

ABRAMS: There are always threats, but I firmly believe that NPTA has always been aware of the main threat, that of not using membership dollars wisely. The Association must always be able to demonstrate that the value received is greater than the dollars spent. I think NPTA has addressed that extremely well.

We can look ahead with a great deal of confidence. At the same time, we don't dare go to sleep. We have to continue to address whether or not we are providing services to our members that give value equal to or greater than their dues payment. We are all in the service business.

MN: Thank you very much.

AT LAST . . .
A VIDEO TAPE PROGRAM THAT TELLS THE STORY OF PAPER MERCHANTS, THEIR INDUSTRY AND THEIR BUSINESS

THE ROLE OF THE PAPER MERCHANT

NPTA's video program *The Role of the Paper Merchant* has been developed to provide its viewer with two specific learning objectives The first objective is to show a paper distribution company employee the role of his company in the marketplace, the industry and ultimately in the U.S. economy.

The second objective is to demonstrate that each person's role *must* be performed if the ultimate company goal is to be achieved. In other words, a motivated, well coordinated group of employees is needed for success.

Please send me _____ copy(ies) of *The Role of the Paper Merchant* Video Tape Program with accompanying Leader's Guide.

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Company _____

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Gear Training Needs to Key Questions

If a company executive or sales manager follows a logical series of key questions, he will be able to evaluate his company's training needs. The success of any paper distribution company's training effort depends on how well it answers questions such as the ones found below.

Over the past few years, there has been a significant change in the way paper merchants operate their businesses, in the make-up of their product lines and the overall market place, the competition and selling environment. There is a renewed interest in developing personnel to meet there challenges.

Successful and profitable growth in this decade and beyond will come through internal development; not just through the introduction of new products, but through employee motivation and personal development programs.

Whether the merchant is in fine or industrial products, runs a single or multi-branch operation, his needs remain the same concerning the growth of his people. Yesterday's solutions to problems on sales, operations and management are not sufficient for today and tomorrow. New methods and applications must be applied.

The key to acquiring these new methods and applications is through training. It is essential for every merchant to assess his present training programs and procedures. Below are questions (originally appearing in **Training and Development Journal** that merchants should be able to answer in the days ahead in order to integrate training into the company.

Setting Up a Training Program

1. What role will training play in our organization?
2. Do we create a training department or add this function to an already existing position?
3. What is expected? Do we have a well-defined job description—responsibility vs. authority? (*What priority does training have in the company? How committed is management?*)
4. How much background, knowledge, education and experience is necessary to get the job done?
5. Are we solving our existing problems, looking toward long range growth, or both?
6. Do we create course content or buy canned programs? Can they be tailor made? *(Consider cost vs. usage.)*
7. How many will we run? *(Frequency, number of people are factors.)*
8. Who will train the trainer?
9. Do we hire outside trainers who provide course materials?
10. Is there a variety of topic selections?
11. What are the parameters on which we base our selection?
12. What is the cost effectiveness?
13. How do we evaluate and measure the outcome of each?

Analyzing Training Programs

1. What are your training objectives?
2. What is the make-up of the class?—education, experience, age, job function and sex.
3. Are there formal presentations?
4. Who? What are his/her qualifications?
5. How many presenters are there? Are there backup presenters?
6. Are all presentations specifically designed to meet training objectives?
7. Do we bring in a special speaker?
8. Are there demonstrations?
9. Is there planned group participation—workshops, team building, role play, case histories?
10. Are there practical exercises to reinforce training points?
11. Are there Q & A periods?
12. Are there study/homework requirements?
13. Is there a planned "results-analysis?" What are the measurements? How will you know that your objectives have been reached?
14. Do the participants know the objectives?
15. Will they learn how to apply what they've learned to their situation?
16. Is there too much material to cover? Too little?
17. Is the program flexible? Set by the clock?
18. Is there enough study time?
19. Is there planned breakdown discussion groups?
20. Is there program content variety? Or is it all lecture? A/V?
21. Is it rehearsed?
22. Is it possible to adapt it on-the-spot to meet audience needs?
23. How structured is it?
24. Are there enough planned breaks?
25. Are there study books, summary handouts, evaluations, etc.?
26. What are the visuals?
27. Are there live demonstrations?
28. Do the participants participate? Is this experienced, taped, and reviewed?
29. Is there to be a "hands-on" experience?
30. Is everything presented and illustrated to appeal to multi-senses?

Location of Training Sessions

In-house?

1. Do we have the proper environment?
2. What is the average class size for each program?
3. Do we have the proper size and number of rooms needed?

4. How many other departments use these rooms?
5. Will there be a scheduling problem?
6. Do we have the right number of tables and chairs?
7. Do we have the proper A-V equipment?
8. What are the outside rental charges for this equipment?
9. Do we handle the rental, depend on the facility to rent it for us, or do we buy our own?
10. How flexible can we be with our program?
11. What are our food service and coffee requirements?
12. Who is responsible for set-up and coordination?
13. What are the distractions going to be—noise, telephone, personal interruptions, delay, etc.?
14. How long is the session—½-day, 1-day, longer?
15. Must we find outside hotel sleeping accommodations?
16. Who provides and coordinates the transportation?

Out-of-house?

1. How much training should we conduct out of the company environment?
2. What type of sessions should be held elsewhere (size and number)?
3. Which levels of employees or management?
4. Should there be a tour of the company facility when in town?
5. Is this a work session or play session?
6. Intense training or awards get-together?
7. How accessible is transportation?
8. How much free time will our trainees be allowed?
9. Will our sessions run four, eight, 10 or 12 hours per day?
10. What additional costs are involved in using an off-site location?
11. Who will coordinate all off-site activities?
12. How much executive time is required?
13. How many types of courses will be offered yearly?
14. How many students will be trained each year?

EVENTS

NOVEMBER

13–15. *Printing Industry Quality Control Seminar. Chicago, Marriott O'Hare. Contact PIA*

10–15. *Paper Distribution Management Development Program, Oxford, OH. Contact NPTA.*

19–20. *Successful Inventory Management for the Wholesale Paper Distributor, Seattle, WA. Contact NPTA.*

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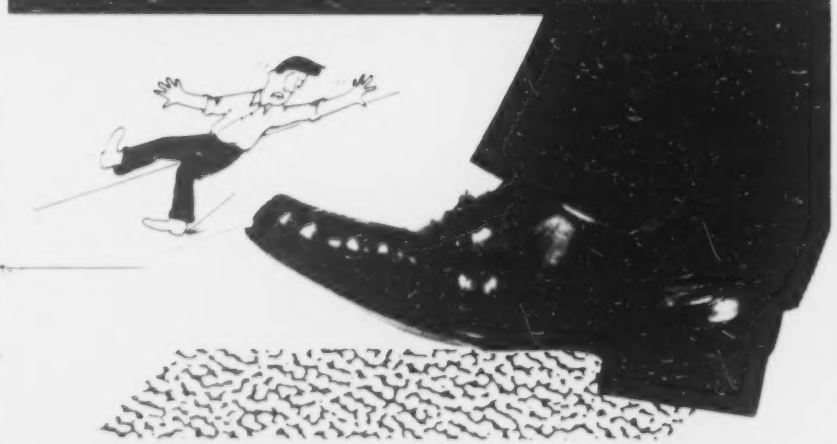

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The Volunteer Leadership of the Paper Distribution Industry

"The volunteer leadership of the National Paper Trade Association is its most valuable resource. The dedication of these people to our industry and its trade association, NPTA, gives me a great deal of pride."

—Richard W. Abrams, chairman, NPTA.

Richard W. Abrams

At a ceremony on Sunday, October 6, 1985, five men were elected to the 17 member board of directors that is charged with establishing the direction of NPTA for the next year. They all sat around a hallow rectangular table and as their names were called they stood.

During the event, some were re-elected, others elected to new positions, while some were recognized for their contribution as their term on the board came to an end.

Executive Committee of the Board of Directors (L–R) Frank J. Viegas, past chairman; Frederick J. Stabbert, second vice chairman; Richard W. Abrams, chairman; Francis J. Houlihan, first vice chairman; James B. Brame, Jr., treasurer.

Presiding at the Annual Business meeting was Frank J. Viegas, president of the Dowd Company of Woburn, MA, who was NPTA's chairman for 1984-85. In the course of the meeting, he asked those who had completed their terms of office on the NPTA board to stand. Each received a framed certificate: Hamel F. Hartinger, Anchor Paper Company, St. Paul, MN; Paul Hirsch, Liberty Paper Company, Bayonne, NJ; and Kenneth A. Leininger, Ohio & Michigan Paper Company. Viegas told those assembled of the important contribution these men had made during their tenure on the board.

For continuity sake, four members of the Association's board are elected each year to serve a three-year term of office. Also elected each year is a new treasurer who sits on the board's executive committee. The treasurer then moves through the chairs to become the top elected leader of the Association.

This year, one member did not leave the board after his term was fulfilled. James B. Brame, Jr., president of The Brame Specialty Company of Durham, NC, was elected treasurer of the Association.

Frederick J. Stabbert, president of Zellerbach Paper Company, San Ramon, CA was elected second vice chairman of NPTA and will serve as chairman of the Association's Printing Paper Division. Francis J. Houlihan, president of The Fleetwood Paper Company, Franklin Park, IL, was re-elected to the executive committee of the board and will serve as

first vice chairman of NPTA and will be responsible for the Industrial Paper Division.

Richard W. Abrams, CEO of West Coast Paper Company, Seattle, WA, was elected chairman of the board for the 1985-86 Association year. (See p. 10 for an in-depth interview with NPTA's new chairman.) All terms of office run from one Annual Convention to the next.

New Board Members Elected

Jonathan O. Bloom, executive vice president of JB Papers, Inc. a printing paper company in Union, NJ, was elected to serve a three-year term on the Association's board of directors. Prior to his election, Mr. Bloom served NPTA as a member, then chairman of the Young Executives Forum Steering Committee.

Alan H. Rosenbloom, president of the Marks Paper Company, a printing paper merchant headquartered in Metairie, LA, was elected to the board. He has been with his company since 1968 and since that time has served a three-year term on NPTA's Printing Paper Division Committee.

Lawrence S. Pollock, Jr., is president of Pollock Paper Distributors, an industrial paper company headquartered in Dallas, TX, with merchant houses in 12 other locations. He has been an active supporter of NPTA programs past and present.

Ronald N. Carter is president and treasurer of Supply/Service, Inc. of St. Louis, MO. He was also elected to serve a three-year term on the board of directors. His company is an industrial paper distributor and Mr. Carter has been active in the paper distribution industry in the St. Louis area.

After their election, the men were charged to uphold the By-laws of the National Paper Trade Association and work toward the continued improvement of the paper, plastics and allied products industry.

James B. Brame

Changing of the Guard

With the elections came the movement of the chairman, Frank Viegas, to the station of "past chairman." This is an important position on the board and executive committee because it is necessary to provide leadership as well as support to the new chairman.

But what happens to the sitting past chairman? Lionel Eltis, president of The Paper Shack and Container Stores of Bossier City, LA was removed to "The Wax Works," an endearing term for the Advisory Council which is made up of all past chairmen.

The accomplishment of this task was Frank Viegas' last official act as chairman of NPTA.

Richard W. Abrams' *first* official act as chairman of NPTA was to announce: "The meeting is adjourned."

A Strong Committee Structure

"NPTA has been blessed with people who are willing to serve their industry in a variety of capacities. The committees are the heart of the Association's projects and activities," said Richard W. Abrams, NPTA chairman.

The following is a list of the Association's committees and chairman:

Advisory Council
Frank J. Viegas

Education and Training
William Ochsner

Employee Pension Plan
F. G. (Mike) Walker

Group Insurance
Paul Hirsch

Industrial Paper Division
Francis J. Houlihan

Long Range Planning
John W. Dietal

Management Information
William C. Powell

Printing Paper Division
Frederick J. Stabbert

Young Executives Forum
Michael K. Olthoff

Jonathan O. Bloom

Alan H. Rosenbloom

Lawrence S. Pollock, Jr.

Ronald N. Carter

Sales Department Performance

The performance of outside sales reps vs. sales service personnel. Outside sales rep and inside "sales service" salaries and expenses are taking a smaller bite out of gross profits for the second consecutive year for industrial and printing paper houses. Dual merchants are the exception.

One of the key aspects of a paper distribution business analyzed by NPTA's annual PAR (Performance Analysis Report) survey is the sales department. Both the outside sales rep and inside or "sales service" personnel's performance are tracked by a variety of measures.

This article reviews trends in compensation expenses for these types of employees during the past three years. All PAR statistics in the tables are medians (50% of respondents' measures fall above and 50% fall below the median figure). Merchants may find it useful to compare the salary levels they pay in relation to company gross profits for their sales personnel against industry averages. There are differences between printing, industrial and dual houses, and by region and company size.

Outside Sales Rep Trends

Printing Paper: Printing paper merchants paid their outside sales reps an average of $45,100 (including travel expenses) during 1984, up 8.7% over 1983. The smallest firms, those with sales under $10 million, paid only $36,000, while large firms with over $55 million in sales paid the highest at $56,650. Reps in the Northeast (NPTA regions 1 & 2: see page 21 for a list of regions) were the best paid in the country, $55,970 and $53,910 respectively. This is to be expected in view of the higher cost of living in this area.

Pay plus travel expenses took a smaller bite out of gross profit dollars during 1984. They accounted for 21.4% of gross profits, cut for the second consecutive year, from 24.6% in 1982. The smallest firms were substantially below this figure at 18.8%. Printing paper merchants also used more sales service employees to support field reps. This ratio rose to .58 inside reps employed per outside rep, highest of all merchant groups.

Industrial Paper: Industrial paper merchants paid their outside reps an average $35,500 (including travel expenses) in 1984, down 1.4% from the prior year. (Survey sample sizes were too small to derive meaningful comparisons by company size or by geographic region.) Like printing paper merchants, industrial houses cut outside sales rep expenses relative to gross profits for the second year in a row, to 23.4% (vs. 24.6% in 1982). Industrial merchants also utilized more sales service people to support the field reps. This ratio rose from .33 to .43 inside sales people per outside salesperson during 1984. Interestingly, larger firms had the lowest number of sales service people.

Dual Merchants: Dual paper merchants paid their outside sales reps an average of $44,100 in 1984, up 7.8% from the prior year. This fairly sizeable increase resulted in these expenses accounting for a larger share of gross profits. Pay plus travel for outside reps represented 25.3% of gross profit dollars in 1984, up from 24.8% in 1983. The smaller companies felt this trend most, as 30.9% of their gross profits were attributed to field sales rep expenses. An average of .47 sales service people supported each dual house outside rep, down from 1983 (in contrast to printing and industrial houses).

Inside Sales Service Trends

Printing Paper: The average sales service employee working for a printing paper merchant was paid $18,700 in 1984, up 2.7% from 1983. Salaries for these people ranged from a low of $16,820 for the smallest firms (net sales under $10 million) to a high of $20,250 for companies in the $20–55 million range.

Relative to gross profits, sales service expenses took a significantly smaller bite, falling from 9.7% to 9.0% in 1984. This percentage declines steadily as company size increases. Companies in NPTA region 4 (OH, MI, WV, KY) had the highest expenses at 10.4% of gross profits.

Industrial Paper: Sales service employees in industrial houses had the lowest pay scale of all merchant groups. Their average nationwide salary actually fell 1.9% to $15,600 during 1984. This is 16% lower than the typical printing paper house and nearly 20% lower than for dual merchants. Consequently, sales service expenses represented only 6.5% of gross profits, down slightly from 1983. Firms with a sales volume of $3–6 million had the highest rate at 7.8% of gross profits.

Dual Merchants: The average dual merchant firm paid sales service employees $19,400 in 1984. This is up nearly 20% from 1983 and is the highest of all merchant groups. During 1982–83 the pay scale for this type employee was about the same as for the average industrial house. This large increase may be misleading. It may be more a reflection of a smaller sample of firms included in the dual merchant database (37 in 1984, 56 in 1983) who paid higher salaries, than actual pay increases of 20%. To confirm this probability, sales service expenses represented 7.9% of gross profits, down from 8.8% the year before.

Note: For more in-depth industrial sales compensation information, order NPTA's new publication *Industrial Paper Sales Compensation*, featuring results of the Industrial Paper Division's Sales Compensation Survey.

OUTSIDE SALES REPS

SALES DEPARTMENT PERFORMANCE MEASURES
ANNUAL PAR RESULTS
(medians)

Printing Paper Merchants	1982	1983	1984	Your Firm
Avg. Pay & Travel Expenses Per Outside Sales Rep (000)*	$43.4	$41.5	$45.1	
Avg. Pay & Travel Expenses As % Gross Profit (%)*	24.6	23.2	21.4	
Sales Service Employees Per Salesperson	.50	.50	.58	
Industrial Paper Merchants				
Avg. Pay & Travel Expenses Per Outside Sales Rep (000)*	$32.3	$36.0	$35.5	
Avg. Pay & Travel Expenses As % Gross Profit (%)*	24.6	24.1	23.4	
Sales Service Employees Per Salesperson	.30	.33	.43	
Dual Paper Merchants				
Avg. Pay & Travel Expenses Per Outside Sales Rep (000)*	$37.4	$40.9	$44.1	
Avg. Pay & Travel Expenses As % Gross Profit (%)*	25.7	24.8	25.3	
Sales Service Employees Per Salesperson	.48	.55	.47	

*Includes supervisors but does not include fringe benefits.

INSIDE SALES SERVICE PERSONNEL

SALES DEPARTMENT PERFORMANCE MEASURES
ANNUAL PAR RESULTS
(medians)

Printing Paper Merchants	1982	1983	1984	Your Firm
Avg. Pay Per Sales Service Employee (000)	$17.1	$18.2	$18.7	
Sales Service Expense As % Gross Profit (%)	9.6	9.7	9.0	
Industrial Paper Merchants				
Avg. Pay Per Sales Service Employee (000)	$15.3	$15.9	$15.6	
Sales Service Expense As % Gross Profit (%)	6.6	6.6	6.5	
Dual Paper Merchants				
Avg. Pay Per Sales Service Employee	$15.9	$16.2	$19.4	
Sales Service Expense As % Gross Profit (%)	8.7	8.8	7.9	

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material for the first half of 1985. The figures reinforce a growing realization, says Printing Industries of America, that the U.S. is close to becoming a net importer of printing. The following figures for imports and exports reveal that while U.S. exports continue to decline, imports are increasing at a rapid clip.

Printed Matter For First Half 1985 vs Same Period 1984		
Exports	$657.4 million	(vs $692.3 million)
Imports	$528.6 million	(vs $493.7 million)
BOOKS		
Exports	$301.7 million	(vs $319.4 million)
Imports	$248.3 million	(vs $228.6 million)

INDUSTRIAL PAPER

FOOD SERVICE DISPOSABLES: NOT IN THE USSR

According to Atlanta columnist Lewis Grizzard, there is a desperate need to improve public health habits in the Soviet Union. Having traveled to that part of the world recently, Grizzard observed that there were no water coolers to be found. "The way to get a drink of water away from home is to put three kopecks into a vending machine which fills a glass of water. The next person uses the very same glass for their drink!"

Mr. Grizzard goes on to report that paper cups, ice cream cones and toilet paper are all made from the same grade of paper. "Coffee drips through the bottom of a cup in about thirteen seconds and ice cream cones in the Soviet Union taste like the sports section of the *Cleveland Plain Dealer*." He goes on to say that to use the toilet paper is to risk "personal injury."

DISPOSABLES VS. REUSEABLES

The September-October issue of *Environmental News Digest* features a report on the survey "Disposables Versus Reusables: A Study of the Comparative Sanitary Quality." The report first appeared in the January issue of the public health journal, *Dairy and Food Sanitation*.

This study compares the sanitary quality of disposables and reuseables in restaurants, motels, nursing homes and hospitals, in the Ann Arbor, MI area where they were tested by the National Sanitation Foundation in 1983. Disposables were found to have far more properties as a health protector and were far easier on budgets as well.

The *Environmental News Digest* cover treatment of the issue takes a light hearted swipe at reuseables by depicting a ceramic cup being KO'd by a disposable. Copies of this publication are available through the Single Service Institute in Washington, DC.

WHAT'S IN IT FOR YOUR CUSTOMER?

A recent issue of *Purchasing World* magazine listed those items most sought by purchasers of packaging. Among those items listed in the article were:

- Ease of opening and resealing the package
- The different types of printing and flexibility in graphic design possible
- How the package lends itself to storage and fluctuating temperatures
- The weight of the package and its shelf life
- Size limitations and consumer appeal

Among other considerations were: Was the package tamperproof? Childproof? Recycliable? Does the package offer ample protection for the product? What was the *cost* of the package in total? Will the package supplier guarantee and stand behind the package? And most important of all, does the package conform to federal government specifications, regulations and state and local rulings.

WHY NOT THE JANITOR?

A recent article written by Carol Kleiman of the *Chicago Tribune* describes the predictions of the U.S. Bureau of Labor Statistics indicating that the job most in demand in the future will be that of ***Janitor***. The article notes that in 1979 there were 2,796,000 building custodians, in 1982–2,828,000, and by 1995 there will be 3,606,000–an increase of 28%. Average salaries in 1983 ranged from $8,736 to $12,272. Male cleaners average $3,000 more a year than females.

A contributing factor to the growth in demand for janitors is new office building construction. Also, according to Joyce Moscato, research analyst for the Service Employees International Union, the growth of the health-care industry and Americans' increasing concerns about health, have helped the janitorial industry grow.

"There is also pressure to keep costs down in health care institutions, hospitals and nursing homes. They are contracting out cleaning work because it is cheaper than hiring housekeeping staff," Ms. Moscato went on to say. Her union represents a variety of service workers and some 400,000 custodians nationwide.

The article also quotes Terry J. Baker, a partner in Servicemaster, part of a nationwide cleaning service: "As more people and businesses demand better service, the job (of custodian) won't be considered so low on the totem pole. It will command more respect as people realize they will have to pay for quality service."

PAPER MERCHANT SALES REPORT

NPTA Region	Sales Per Selling Day September 1985 - Compared To - September 1984	Sales Per Selling Day September 1985 - Compared To - August 1985	Sales Per Selling Day 1985 Year-to-Date - Compared To - 1984 Year-to-Date	Days Outstanding (Accounts and Notes) At Close of September 1984	Days Outstanding (Accounts and Notes) At Close of September 1985	Calendar Day Cost* of Ending August Inventory 1984	Calendar Day Cost* of Ending August Inventory 1985
INDUSTRIAL							
1	− 2.6	+ 5.9	+ 3.4	46	42	—	—
2	+ 0.1	+ 4.4	− 0.7	37	36	51	46
3	− 1.9	− 0.9	− 3.3	37	38	64	60
4	− 0.6	+ 2.3	− 2.4	39	37	51	53
5	+ 2.7	+ 9.4	+ 5.4	36	35	57	58
6	− 1.7	+ 5.7	'	40	41	—	—
7	− 3.3	+ 0.2	− 2.6	38	37	57	59
NY	+ 9.0	−12.3	+10.2	46	44	—	—
Chicago	+ 3.8	+ 2.1	+ 0.0	38	39	—	42
LA	− 0.3	+ 8.9	− 2.1	52	50	—	52
US	+ 0.2	+ 1.8	− 0.3	40	39	55	54
PRINTING							
1	−10.1	+ 7.7	+ 4.5	49	53	58	—
2	− 0.9	+ 6.9	+ 3.5	47	46	62	60
3	− 2.9	− 1.2	+ 5.2	43	44	78	74
4	+ 1.2	+ 6.5	+ 5.1	40	44	71	66
5	+ 4.4	+ 8.0	+ 1.1	41	45	—	77
6	− 3.0	− 1.9	'	40	39	—	—
7	+ 1.4	+ 8.2	+ 0.0	38	40	76	70
NY	+11.0	+13.2	− 0.4	42	42	—	—
Chicago	−10.9	+ 6.9	− 5.6	43	43	—	—
LA	− 4.4	− 9.0	+ 2.7	43	43	79	80**
US	− 0.1	+ 5.2	+ 2.1	43	44	72	70

*To calculate montly inventory turnover, divide 365 calendar days by # of calendar days cost, e.g., 365/73 = 5.00x.

**Last month's report listed a figure of 97 days. This was a misprint, and should be 92 days.

'Insufficient data to calculate valid number.

Region 1: CT, ME, MA, NH, RI & VT
Region 2: DE, DC, MD, NJ, NY & PA (excluding NY Metro)
Region 3: AL, FL, GA, NC, SC, TN & VA
Region 4: IL, IN, KY, MI, MO, OH, WV & WI (excluding Chicago Metro)
Region 5: CO, IA, KS, MN, MT, NE, ND, SD, WY
Region 6: AK, AZ, CA, HI, ID, NV, NM, OR, UT & WA (excluding LA Metro)
Region 7: AR, LA, MS, OK & TX
NY Metro: NY: New York City, Long Island and Westchester Co. NJ: Counties of Bergen, Essex, Hudson, Middlesex, Passaic and Union
Chicago Metro: IL: City of Chicago and Cook, DuPage and Lake Cos. IN: Lake Co.
LA Metro: Cities: Los Angeles, and San Diego. Counties: Los Angeles, San Diego, Orange and Ventura (and neighboring parts of Riverside and San Bernadino)

Selling Days
The actual number of days a firm was open for business or that the sales people made customer calls [calendar days less weekends (if applicable) and holidays]. By supplying selling days of each firm, the sales per selling day are standardized according to actual business conditions or company policies.

Days Outstanding
The number of days outstanding on this report are calculated by adding the current month's sales and the previous month's sales and dividing the total by the number of calendar days of the two months. The result is a figure representing average sales per calendar day.

The total figure provided for closing accounts and notes receivable is divided by the average sales per calendar day. The result is the number of days outstanding at the end of the month being prepared.

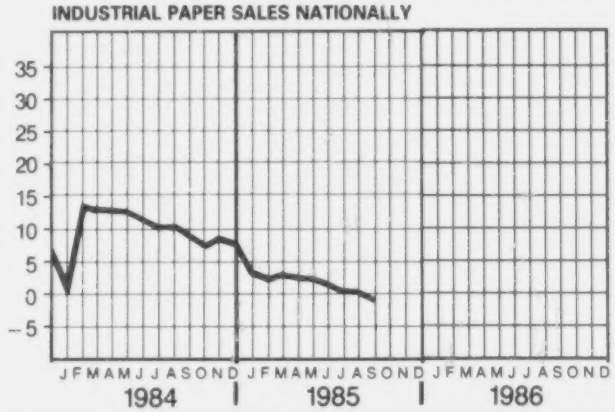
PAPER MERCHANT SALES REPORT

SUMMARY NATIONAL TREND INFORMATION: 1984 TO PRESENT

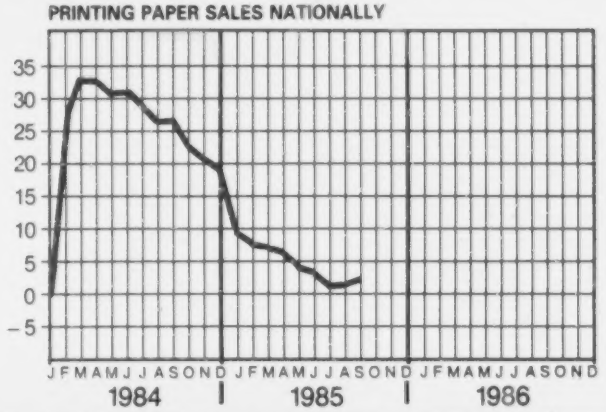
SALES INFORMATION

YEAR-TO-DATE SALES PER SELLING DAY AS A PERCENTAGE OF PREVIOUS YEAR'S YEAR-TO-DATE SALES PER SELLING DAY

INDUSTRIAL PAPER SALES NATIONALLY



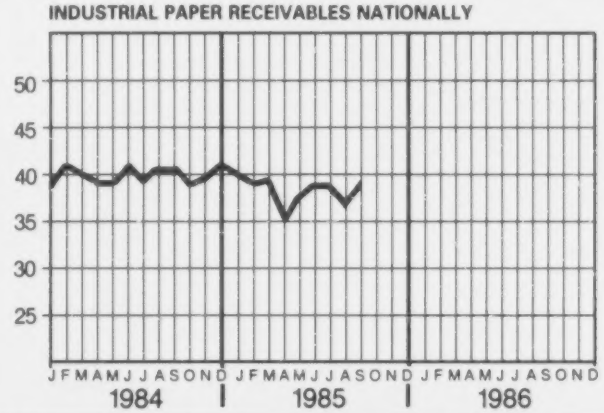
PRINTING PAPER SALES NATIONALLY



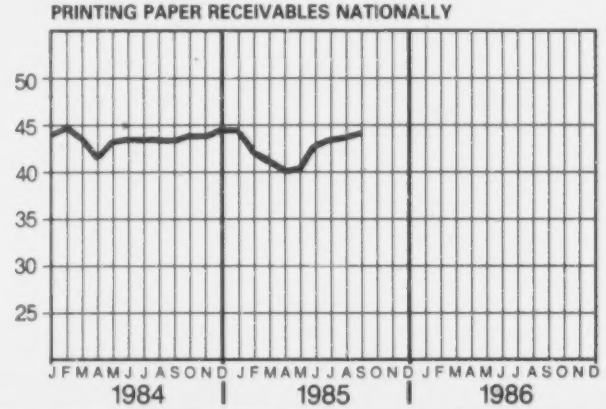
RECEIVABLES INFORMATION

DAYS OUTSTANDING—ACCOUNTS AND NOTES RECEIVABLE FROM PAPER SALES AT END OF EACH MONTH (IN CALENDAR DAYS)

INDUSTRIAL PAPER RECEIVABLES NATIONALLY



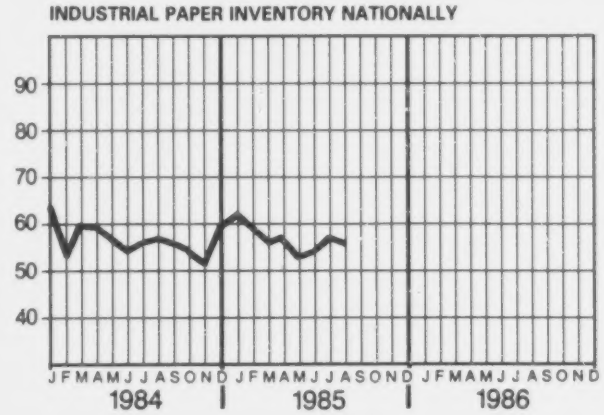
PRINTING PAPER RECEIVABLES NATIONALLY



INVENTORY INFORMATION

CALENDAR DAYS COST OF ENDING MONTHLY INVENTORY (FIFO) (IN CALENDAR DAYS)

INDUSTRIAL PAPER INVENTORY NATIONALLY



PRINTING PAPER INVENTORY NATIONALLY

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